

LETTER OF INTENTION TO DONATE SECURITIES

Date _____

Please complete this form and provide it to the Catholic Diocese of Harrisburg prior to making a donation. Failure to do so may prevent the securities from being properly delivered. Please make sure that you notify your broker of your intent to donate these assets. You may share this document with your broker in order to assist the initiating of the transfer. Simply notifying the Diocese will not authorize the transfer.

Completed forms can either be faxed to (717) 657-4818 or emailed to development@hbgdiocese.org

or

Mail to: Catholic Diocese of Harrisburg
Office of Financial Administration
4800 Union Deposit Road
Harrisburg, PA 17111-3710

I/We would like to donate the following securities to the Diocese of Harrisburg as a charitable gift.

Name of company _____

Number of shares _____

Beneficiary parish/school/institution _____

Purpose of gift (e.g., capital campaign, regular offering, special gift) _____

The most expedient methods of transfer are described below. Other methods of delivery may result in a delayed transfer. Please select one:

_____ The stock certificate **in the name of the donor(s)** should be delivered to the Office of Financial Administration, accompanied by a signed stock power and this letter. Please do NOT complete the back of the stock certificate. ALL owners of the security MUST sign the stock power EXACTLY as the name(s) appear on the front of the stock certificate. If delivery to the Diocesan Center is not possible, the stock certificate and stock power may be mailed separately via registered mail to the Diocese at the address above.

_____ Stock shares are presently being held in a brokerage account as indicated below:

_____ If donating a mutual fund, it is important that you contact the Office of Development with the Catholic Diocese of Harrisburg at 717-657-4804 or development@hbgdiocese.org prior to completing this form

Name of brokerage firm _____

Account # _____ Name of brokerage representative _____

Please accept this letter as authorization to transfer the above-indicated shares to JP Morgan Chase Bank using the following instructions. A copy of this letter must be mailed to your brokerage representative.

Bank: JP Morgan Chase Bank
DTC Participant #: 902
FFC to Account #: P72500
For Account #: PBD#Q41373-004
For Account of: The Diocese of Harrisburg – Donations – Equity Port

Name(s) of donor(s) – please print _____

Signature _____

Address _____

Address _____

Telephone (____) _____ (____) _____